



Career Planner User Guide

For States, Divisions, & Centers

September 2021

Note: This user guide is solely for guiding leaders through the process of adding state-specific information to the career planners. This user guides should **not** be used by supervisors or employees.

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Definitions

Average Assessed Proficiency Rating: the score calculated by averaging the proficiency ratings provided by the employee in the self-assessment and/or the supervisor evaluation; if one proficiency rating was not provided, the assessed proficiency score included only the provided rating

Competency: a measurable pattern of knowledge, skills, abilities, behaviors, and other characteristics that an individual needs to perform work roles or occupational functions successfully

Gap: an area where the employee has not met the proficiency expectations for their role/grade level; determined by subtracting the target proficiency rating from the average assessed proficiency rating; a negative value

Group: second level organization of a task within a competency

Resource: a course, website, handbook, etc. that is currently available through NRCS and the Farm Production and Conservation (FPAC) Mission Area to help employees learn and accomplish the important tasks that they are responsible for in their roles

Self-Assessed Proficiency Rating: the current proficiency level indicated by the employee for a specific task

Subgroup: third level organization of a task within a competency

Supervisor Assessed Proficiency Rating: the current proficiency level indicated by an employee's supervisor for a specific task

Surplus: an area where the employee has met or exceeded the proficiency expectations for their role/grade level; determined by subtracting the target proficiency rating from the average assessed proficiency rating; a positive value

Target Proficiency Rating: the expected level of proficiency for a given grade in a competency; serves as a benchmark when assessing employees' current level of proficiency

Task: an action that the individual needs to be able to perform in order to function in their job at the appropriate grade level; the majority of the tasks within the career planners apply to the job across the nation, but states have the ability to customize the career planner by adding additional state-specific tasks

Tool: a device or application that is currently available through NRCS and/or the FPAC Mission Area that supports an individual in completing a task

Introduction to the Career Planner

Description

A career planner is an interactive training plan that details the [tasks](#) that an employee needs to accomplish to do their job successfully. It is designed to help employees identify what training is needed in their current grade level and as they continue with their career at NRCS.

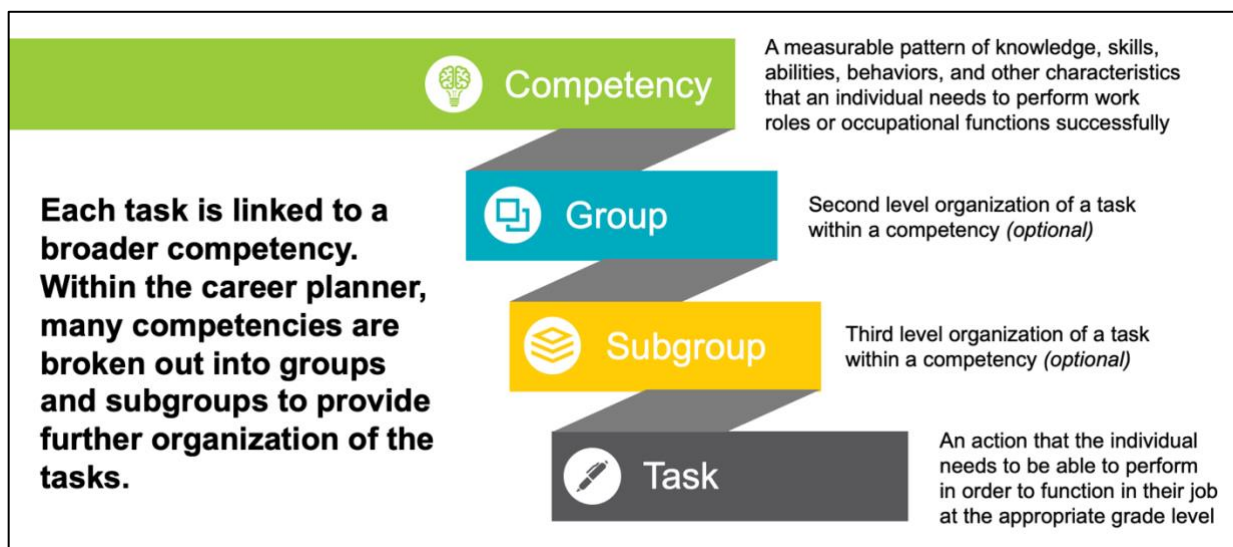


Figure 1: Organization of Tasks within Career Planners

Additionally, each task is linked to a list of [resources](#) and [tools](#) that are currently available through NRCS and the Farm Production and Conservation (FPAC) Mission Area that help employees accomplish that task. While the resources and tools listed within this document are comprehensive, they are not exhaustive.

The information within each career planner applies to the job across the nation. However, some customization may be needed for states, divisions, and centers. States, divisions, and centers can customize the career planner by adding additional state-specific tasks and resources. The [target proficiency ratings](#) within the planner may also be tailored to the job requirements of each individual employee at the discretion of the employee's supervisor. Individual employees do not have the ability to change the information within the career planner to ensure the job duties expectations are only set at the supervisory level and above.

Development

The career planner content was created using materials from the FPAC Mission Area (e.g., position descriptions) and outside sources (e.g., OPM's position classifications). Then, subject matter experts (SMEs) at various GS levels from across the country reviewed and edited the career planner content to ensure it accurately reflected what is needed to successfully perform the job. Following the workshop, a survey was administered to the SMEs to identify the importance of each task, whether each task was needed at entry, and the target proficiency rating for each task. Lastly, the information from the survey was analyzed and inputted into the career planner for the appropriate job series.

Use

An employee will first input [self-assessed proficiency rating](#) for each task into the career planner. Then, their supervisor will input their assessment for the employee for each task within the fields labeled “[supervisor assessed proficiency rating](#).” Once both of these types of ratings are entered, the [average assessed proficiency ratings](#) will automatically be calculated and populated within the career planner. The average assessed proficiency rating is then compared to the target proficiency rating, resulting in either a [gap](#), [surplus](#), or target met. Employees will then identify resource(s) and/or tool(s) that align with the tasks that they are deficient in. More detailed information on this process is included in the *Career Planner User Guide for Supervisors & Employees* as well a demonstration video.

From an agency perspective, NRCS will use the career planner for training and development purposes to add consistency and structure to employee development across the organization. Because career planners set standard expectations, they are an excellent starting point for expected knowledge, skills, and abilities of employees. The career planner provides a comprehensive roadmap for employee development at all grade and career levels. Career planners should **not** be used for performance management or promotion decisions.

Role & Responsibilities

States, Divisions, & Centers

Leaders at the states, divisions, and centers are responsible for encouraging the use of the career planners and adding state-, division-, and center-specific task information as needed. For efficiency purposes, this will be referred to as state-specific information throughout this user guide as well as within the career planners.

States, divisions, and centers can customize the career planner by adding additional state-specific tasks and resources. Instructions on how to do this are included within this document. It is best that states, divisions, and centers appoint a single individual to be responsible for customizing the career planner to ensure accuracy, consistency, and maintain version control.

While the career planner is completely unlocked for leaders at the state or center to customize the document, nationally set information (i.e., [competencies](#), [groups](#), [subgroups](#), tasks, target proficiency ratings) should **not** be removed under any circumstance.

Supervisors

Supervisors are responsible for communicating and implementing the career planners with their employees as well as completing the supervisor portions of the career planner. Information on how to do this is included in a separate user guide for supervisors and employees.

Supervisors can alter target proficiency ratings within the planner so that they best fit the job requirements of each individual employee. However, this should **not** be a common occurrence as the nationally set target proficiency ratings were determined through a rigorous, data-driven process.

The career planner is locked for supervisors so that they can only input information using the yellow boxes.

Employees

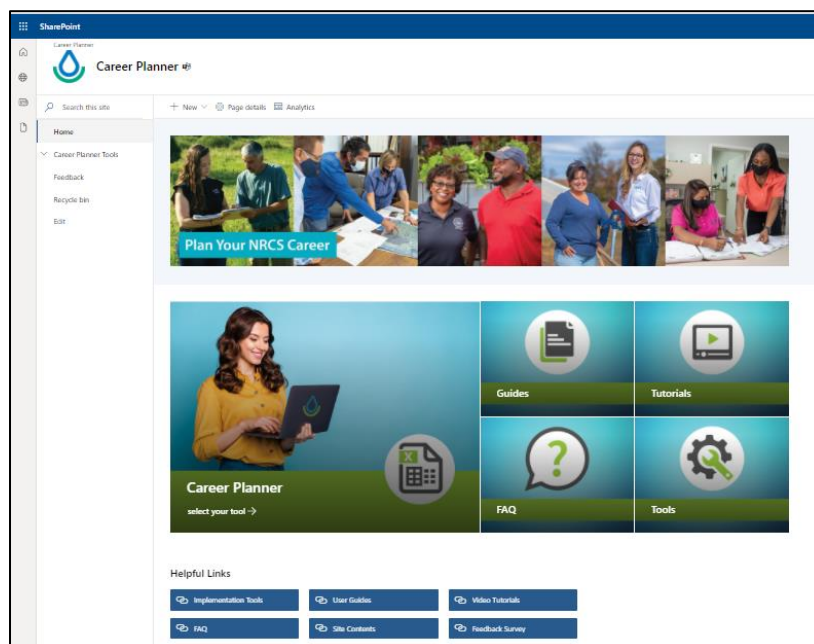
Employees are responsible for completing most of the career planner and coordinating its overall completion with their supervisor. Information on how to do this is included in a separate user guide for supervisors and employees.

The career planner is locked for employees so that they can only input information using the yellow boxes.

Instructions

Step 1: Open the Career Planner

1. Navigate to the NRCS Career Planner SharePoint Page.



2. Download and save a copy of the career planner file.
3. Open the career planner file using the Excel desktop application.
4. Click the **Enable Content** button in the yellow bar with the message "Macros have been disabled."



Step 2: Add State-Specific Tools and/or Resources to an Existing National Task (*optional*)

IMPORTANT: Only complete this step if your state, division, or center has tools or resources that are only available within your state, division or center and they would increase an employee's proficiency in any of the national tasks, start with **Step 2**. If not, skip to **Step 3**.

TIP: Share the list of national tasks with other members of leadership within your state or center via PDF to collect a list of state-specific tools or resources associated with any nationally set tasks before completing **Step 2**. To access the list, first click the **Key Definitions & Target Ratings** button under *Navigation*. Next, click the **Target Proficiency Ratings** button. Then, click the **Print Page to PDF** button on the right. A PDF document should pop up on the screen. Save this document to your desktop before sharing it with others.

1. Click the **Add State-Specific Information** button under *Navigation*.
2. Click the light gray button on the button left titled **Add Tools and/or Resources to an Existing Task**.

Return to Competency Assessment

Add Tools and/or Resources to an Existing Task

Add State-Specific Task / Import Previously Added State-Specific Tasks

- On this page, you will see the following form and two (2) buttons:

Enter State-Specific Tools and/or Resources								
Select the Competency								
Select the Group								
Select the Subgroup								
Select the Task								
Type in Tools for the Task								
Type in Resources for the Task								
Select the State								

Back
 Add Tools and/or Resources to an Existing Task

3. Select the competency (row 1), group (row 2), subgroup (row 3), and task (row 4), in this order, associated with the tool(s) and/resource(s) you would like to add from the drop-down menus.
 - Once an item is selected from the drop-down menus, the cell will turn green.
 - Tool(s) and/or resource(s) must be associated with a task, not just a competency, group, or subgroup. Be sure to complete the first four rows of the form before going on to the next step.
 - If you select the incorrect competency, group, subgroup, or task, select all the boxes that have the incorrect information and press the **delete** button on your keyboard. Then, reselect the correct information, starting from the topmost yellow cell.

Enter State-Specific Tools and/or Resources								
Select the Competency	Conservation Planning							
Select the Group	Application & Evaluation							
Select the Subgroup	Implement Plan							
Select the Task	Design appropriate conservation practices							
Type in Tools for the Task								
Type in Resources for the Task								
Select the State								

4. Type in the tool(s) (row 5) and/or resource(s) (row 6) associated with the task.
 - Once text is entered and the cell is no longer selected, the cell will turn green.
 - You can add multiple tools and resources at one time.
 - Tool(s) and/or resource(s) do not align with specific GS levels.

Enter State-Specific Tools and/or Resources								
Select the Competency	Conservation Planning							
Select the Group	Application & Evaluation							
Select the Subgroup	Implement Plan							
Select the Task	Design appropriate conservation practices							
Type in Tools for the Task	Tool 1	Tool 2						
Type in Resources for the Task	Resource 1	Resource 2						
Select the State								

5. Select the state (row 7) associated with your task from the drop-down menu.
 - Once an item is selected from the drop-down menu, the cell will turn green.
 - Up to ten (10) areas/teams are available for selection for each state. This is to allow for the various offices across each state to customize the career planner to meet their needs.
 - State, division, and center leaders should determine who employees should contact to identify which area/team they are in. This point of contact should be communicated in the state bulletin.

Enter State-Specific Tools and/or Resources								
Select the Competency	Conservation Planning							
Select the Group	Application & Evaluation							
Select the Subgroup	Implement Plan							
Select the Task	Design appropriate conservation practices							
Type in Tools for the Task	Tool 1	Tool 2						
Type in Resources for the Task	Resource 1	Resource 2						
Select the State	NJ - Area/Team 1							

6. Click the blue **Add Tools and/or Resources to an Existing Task** button.
 - Once tool(s) and/or resource(s) are inputted into the career planner, they cannot be removed.

TIP: Thoroughly review the information inputted into the **Enter State-Specific Tools and/or Resource** table before clicking the **Add Tools and/or Resources to an Existing Task** button.

Enter State-Specific Tools and/or Resources								
Select the Competency	Conservation Planning							
Select the Group	Application & Evaluation							
Select the Subgroup	Implement Plan							
Select the Task	Design appropriate conservation practices							
Type in Tools for the Task	Tool 1	Tool 2						
Type in Resources for the Task	Resource 1	Resource 2						
Select the State	NJ - Area/Team 1							

Back

Add Tools and/or Resources to an Existing Task

7. Click the **Tools & Resources** button under *Navigation*.
8. Use the filters and scroll bar on the **Tools & Resources** page to verify that the tool(s) and/or resource(s) have been added to the career planner.
 - On the **Tools & Resources** page, a user can filter by competency, gap/surplus, and task using the blue buttons under the corresponding header. When a user clicks a blue button, all the other buttons within that filter will turn gray and the table will only show information related to the button in blue. Multiple filters can be applied at once. To remove a filter, click the button to the right of the filter header.

Competency

Compliance

Conservation Planning

Farm Bill Program Management

N/A

Foundational

Leadership & Management

Outreach

Project/Program Management

Technical Expertise

- New tool(s) and resource(s) will be shaded bright yellow.

Competency	Group	Subgroup	Task	Level	Tool/Resource	Complete?	Gap/Surplus	Type of Goal?
Conservation Planning	Application & Evaluation	Implement Plan	Design appropriate conservation practices	NJ - Area/Team	Tool 1		N/A	
Conservation Planning	Application & Evaluation	Implement Plan	Design appropriate conservation practices	NJ - Area/Team	Tool 2		N/A	
Conservation Planning	Application & Evaluation	Implement Plan	Design appropriate conservation practices	NJ - Area/Team	Resource 1		N/A	
Conservation Planning	Application & Evaluation	Implement Plan	Design appropriate conservation practices	NJ - Area/Team	Resource 2		N/A	

IMPORTANT: If the tool(s) and/or resource(s) do not populate on the **Tools & Resources** page, contact Rebecca Salazar (rebecca.salazar@usda.gov) or Laura Emberson (laura.emberson@usda.gov) for assistance.

Step 3: Add State-Specific Tasks/Import Previously Added State-Specific Tasks (*optional*)

IMPORTANT: If your state, division, or center would like to add any state-specific tasks or import any previously added state-specific tasks to the career planner, continue with **Step 3**. If not, skip to **Step 4**.

There are two functions within this step:

- Function 1 - Add a State-Specific Task
- Function 2 - Import Previously Added State-Specific Tasks

1. Click the **Add State-Specific Information** button under *Navigation*.
2. Click the light gray button on the button right titled **Add State-Specific Task / Import Previously Added State-Specific Tasks**.

Return to Competency Assessment

Add Tools and/or Resources to an Existing Task

Add State-Specific Task / Import Previously Added State-Specific Tasks

- On this page, you will see the following form and three (3) buttons:

Enter New Task											
Select the Competency											
Select the Group											
Select the Subgroup											
Type in the New Task											
Type in Tools for the Task											
Type in Resources for the Task											
Select the Target Proficiency Ratings for the Task at Each Grade Level	GS-02	GS-03	GS-04	GS-05	GS-07	GS-09	GS-11	GS-12	GS-13	GS-14	GS-15
Select the State											

Back

Submit New Task

Add Established Tasks to Career Planner

FUNCTION 1: Add a State-Specific Task

IMPORTANT: A task should only be added when there are no national level tasks that address it. Please thoroughly review the current tasks before adding any. Added tasks should be clear, actionable, observable, and begin with a verb. Words and phrases such as "understand" and "demonstrate knowledge of" should not be used. Instead, use words such as "recognize," "document," or "explain" followed by a specific, measurable task.

- Select the competency (row 1), group (row 2), and subgroup (row 3), in this order, associated with the new task from the drop-down menus.
 - Once an item is selected from the drop-down menus, the cell will turn green.
 - If you select the incorrect competency, group, subgroup, or task, select all of the boxes that have the incorrect information and press the **delete** button on your keyboard. Then, reselect the correct information, starting from the topmost yellow cell.

Enter New Task											
Select the Competency	Conservation Planning										
Select the Group	Application & Evaluation										
Select the Subgroup	Implement Plan										
Type in the New Task											
Type in Tools for the Task											
Type in Resources for the Task											
Select the Target Proficiency Ratings for the Task at Each Grade Level	GS-02	GS-03	GS-04	GS-05	GS-07	GS-09	GS-11	GS-12	GS-13	GS-14	GS-15
Select the State											

- Type in the new task (row 4) as well as any tool(s) (row 5) and/or resource(s) (row 6) associated with the new task.
 - Once text is entered and the cell is no longer selected, the cell will turn green.
 - You can add multiple tools and resources at one time.
 - Tool(s) and/or resource(s) do not align with specific GS levels.

Enter New Task											
Select the Competency	Conservation Planning										
Select the Group	Application & Evaluation										
Select the Subgroup	Implement Plan										
Type in the New Task	New Task 1										
Type in Tools for the Task	Tool 3		Tool 4								
Type in Resources for the Task	Resource 3		Resource 4								
Select the Target Proficiency Ratings for the Task at Each Grade Level	GS-02	GS-03	GS-04	GS-05	GS-07	GS-09	GS-11	GS-12	GS-13	GS-14	GS-15
Select the State											

3. Select target proficiency ratings for each GS level (row 7) from the drop-down menus.
 - Reference the **Key Definitions & Target Ratings** page to review the proficiency scale and proficiency level definitions and select the proficiency level needed to successfully perform the task at each grade level.
 - Target proficiency Ratings for each GS level must be selected prior to submitting the new task.

Enter New Task												
Select the Competency	Conservation Planning											
Select the Group	Application & Evaluation											
Select the Subgroup	Implement Plan											
Type in the New Task	New Task 1											
Type in Tools for the Task	Tool 3		Tool 4									
Type in Resources for the Task	Resource 3		Resource 4									
Select the Target Proficiency Ratings for the Task at Each Grade Level	GS-02	GS-03	GS-04	GS-05	GS-07	GS-09	GS-11	GS-12	GS-13	GS-14	GS-15	
	1	1	2	2	2	3	3	4	4	5	5	
Select the State												

4. Select the state (row 8) associated with your task from the drop-down menu.
 - Once an item is selected from the drop-down menu, the cell will turn green.
 - Up to ten (10) areas/teams are available for selection for each state. This is to allow for the various offices across each state to customize the career planner to meet their needs.
 - State and center leaders should determine who employees should contact to identify which area/team they are in. This point of contact should be communicated in the state bulletin.

Enter New Task												
Select the Competency	Conservation Planning											
Select the Group	Application & Evaluation											
Select the Subgroup	Implement Plan											
Type in the New Task	New Task 1											
Type in Tools for the Task	Tool 3		Tool 4									
Type in Resources for the Task	Resource 3		Resource 4									
Select the Target Proficiency Ratings for the Task at Each Grade Level	GS-02	GS-03	GS-04	GS-05	GS-07	GS-09	GS-11	GS-12	GS-13	GS-14	GS-15	
	1	1	2	2	2	3	3	4	4	5	5	
Select the State	NJ - Area/Team 1											


5. Click the blue **Submit New Task** button.
 - Once the new task, tool(s) and/or resource(s) are inputted into the career planner, they cannot be removed.

Enter New Task												
Select the Competency	Conservation Planning											
Select the Group	Application & Evaluation											
Select the Subgroup	Implement Plan											
Type in the New Task	New Task 1											
Type in Tools for the Task	Tool 3		Tool 4									
Type in Resources for the Task	Resource 3		Resource 4									
Select the Target Proficiency Ratings for the Task at Each Grade Level	GS-02	GS-03	GS-04	GS-05	GS-07	GS-09	GS-11	GS-12	GS-13	GS-14	GS-15	
	1	1	2	2	2	3	3	4	4	5	5	
Select the State	NJ - Area/Team 1											

Back

Submit New Task

Add Established Tasks to Career Planner

6. Click the **Competency Assessment** button under *Navigation*.
7. Use the filters and scroll bar on the **Competency Assessment** page to verify that the new task, tool(s) and/or resource(s) have been added to the career planner.
 - On the **Competency Assessment** page, a user can filter by competency, gap/surplus, and task using the blue buttons under the corresponding header. When a user clicks a blue button, all of the other buttons within that filter will turn gray and the table will only show information related to the button in blue. Multiple filters can be applied at once. To remove a filter, click the  button to the right of the filter header.

Competency

Conservation Planning


 Level

National

NJ - Area/Team 1

					Please select your GS level			
Competency	Group	Subgroup	Task	Level	Self-Assessed Proficiency Rating	Supervisor/Trainer Assessed Proficiency Rating	Target Proficiency Rating	Modified Target Proficiency Rating (Employee)
Conservation Planning	Application & Evaluation	Implement Plan	New Task 1	NJ - Area/Team 1				

IMPORTANT: If the task, tool(s) and/or resource(s) do not populate on the **Competency Assessment** page, contact Rebecca Salazar (rebecca.salazar@usda.gov) or Laura Emberson (laura.emberson@usda.gov) for assistance.

FUNCTION 2: Import Previously Added State-Specific Tasks

1. Click the **Add Established Tasks to Career Planner** button.

Enter New Task											
Select the Competency											
Select the Group											
Select the Subgroup											
Type in the New Task											
Type in Tools for the Task											
Type in Resources for the Task											
Select the Target Proficiency Ratings for the Task at Each Grade Level	GS-02	GS-03	GS-04	GS-05	GS-07	GS-09	GS-11	GS-12	GS-13	GS-14	GS-15
Select the State											

Back

Submit New Task

Add Established Tasks to Career Planner

- On this page, you will see the following three (3) buttons:

Import Previously Developed Tasks

Update New Career Planner

Return to Home

2. Open the version of the career planner with additional state-specific tasks on your desktop and complete the following:

- A. Click the **Add State-Specific Information** button under *Navigation*.
- B. Click the light gray button on the button right titled **Add State-Specific Task / Import Previously Added State-Specific Tasks**.

Return to Competency Assessment

Add Tools and/or Resources to an Existing Task

Add State-Specific Task / Import Previously Added State-Specific Tasks

C. Click the **Add Established Tasks to Career Planner** button.

Enter New Task											
Select the Competency											
Select the Group											
Select the Subgroup											
Type in the New Task											
Type in Tools for the Task											
Type in Resources for the Task											
Select the Target Proficiency Ratings for the Task at Each Grade Level	GS-02	GS-03	GS-04	GS-05	GS-07	GS-09	GS-11	GS-12	GS-13	GS-14	GS-15
Select the State											

Back

Submit New Task

Add Established Tasks to Career Planner

D. Click the **Import Previously Developed Tasks** button.

Import Previously Developed Tasks

Update New Career Planner


Return to Home

3. On the version of the career planner without additional state-specific tasks and click the **Update New Career Planner** button.

Import Previously Developed Tasks

Update New Career Planner

Return to Home

4. Use the filters and scroll bar on the **Competency Assessment** page to verify that the previously added state-specific tasks have been added to the career planner.
 - On the **Competency Assessment** page, a user can filter by competency, gap/surplus, and task using the blue buttons under the corresponding header. When a user clicks a blue button, all of the other buttons within that filter will turn gray and the table will only show information related to the button in blue. Multiple filters can be applied at once. To remove a filter, click the  button to the right of the filter header.

Competency



Level



Compliance	Conservation Planning	Farm Bill Program...	National
Foundational	Leadership & Management	Outreach	
Project/Program Management	Technical Expertise		

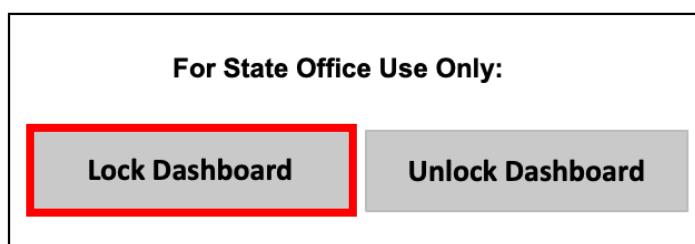
IMPORTANT: If the task, tool(s) and/or resource(s) do not populate on the **Competency Assessment** page, contact Rebecca Salazar (rebecca.salazar@usda.gov) or Laura Emberson (laura.emberson@usda.gov) for assistance.

Step 4: Lock the Career Planner

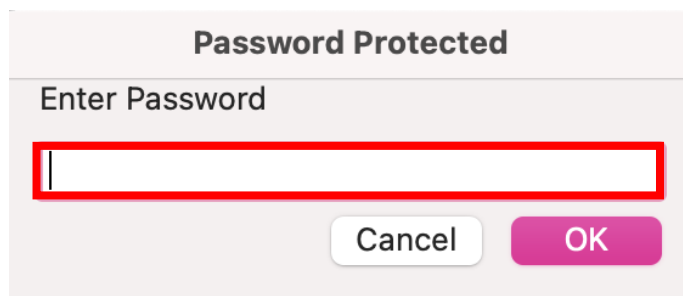
1. Click the **Home** button under *Navigation*.



2. Click the **Lock Dashboard** button within the *For State Office Use Only* box.



3. Type the appropriate password into the pop-up window.



- The password for the 0470 (Major Land Resource Area) career planner is "RegionpassDB1". For all other career planners, the password is "StatepassDB1."
- Once this button is clicked and the password is entered, the **Add State-Specific Information** button under *Navigation* as well as the gray box will disappear, and the career planner will no longer be editable. NRCS employees will only be able to enter information in the yellow boxes.
- If additional state-specific tasks or resources need to be added after the career planner has been locked, click the **Unlock Dashboard** button within the *For State Office Use Only* box. Type the appropriate password into the pop-up window. The **Add State-Specific Information** button under *Navigation* as well as the gray box will reappear.

Step 5: Distribute to Supervisors & Employees

The distribution of career planners depends on if a state, division, or center has adopted and/or customized the career planners:

- A. If your state, division, or center does not adopt and does not customize a career planner:
 - *Direct employees to access the national version of the corresponding career planner on the national Career Planner SharePoint Page.*
- B. If your state, division, or center adopts but does not customize a career planner:
 - *Store the corresponding career planner on the appropriate state, division, center, or national SharePoint site.*
- C. If your state, division, or center adopts and customizes a career planner:
 - *Store the corresponding career planner on your internal SharePoint site.*

IMPORTANT: Contact your **state POC** if you have questions regarding the distribution of career planners.

